



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title
Purchasing Officer

Job Code Title
Purchasing Technician

Pay Band
04

Job Code Number
433614

Citizen Services and Resource Management Division
Financial and Asset Management Bureau

Fair Labor Standards Act
Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Citizen Services and Resource Management Division administers the accounting, purchasing, safety, security, statewide facility functions, call center, forms design, one-stop business licensing coordination, and receipt and distribution of unclaimed property. The division includes the Financial and Asset Management Bureau and the Citizen Services Bureau. The Financial and Asset Management Bureau is responsible for the accounting and financial management functions of the department including distribution of tax revenues collected, monitoring and payment of department expenses, preparation of budget projections, processing the necessary accounting transactions on the state's financial systems, and analysis of financial transactions impacting the department. The bureau also coordinates the department's purchasing functions and resolves matters regarding safety, security, and facilities for department employees and the agency's office locations statewide.

Job Responsibilities

The Purchasing Officer purchases department equipment and supplies; receives, reviews, and processes purchase requests; manages purchasing contracts; tracks department assets and accounting transactions; coordinates state procurement cards for the department; and provides information on purchasing rules, policies, and procedures. The position reports to the division administrator and does not supervise other staff.

- **Processing Purchasing and Procurement Requests 50%**
 1. Tracks supplies and equipment. Places scheduled orders for the divisions to ensure an adequate working inventory and verifies availability of regularly ordered items.
 2. Reviews purchasing request forms for complete purchasing information and compliance with contracts and internal and state purchasing guidelines. May suggest changes to the request to procure items at a lower cost.
 3. Identifies the most cost-effective quantity and means to fill requests following purchasing and procurement policies. Reviews purchasing history and available new items. Works with department staff to standardize purchases to meet needs and minimize inventory.
 4. Reviews requests for deviation from standard purchasing policies and procedures on sole source and emergency purchases. Recommends appropriate action based on the circumstances of the request and knowledge of Montana purchasing statutes.

5. Reviews vendor requests for changes and substitutions to ensure that the goods or services meet the needs of the agency by researching information on alternative items, services, and prices and determining appropriate alternatives.
6. Generates requisitions and agency purchase orders when procuring needed supplies and equipment. Routes purchase orders with necessary documentation to the necessary managers for approval.
7. Receives and checks incoming supplies to verify quality, quantity, and accuracy of shipments. Compares invoices and packing slips with orders. Inspects supplies and reviews services received to ensure they meet required specifications and comply with contract provisions. Follows up on delivery schedules for purchase orders. Assures that items supplied by each vendor meet or exceed specifications stated in the purchase order or contract.

- **Managing Purchasing Contracts 15%**

1. Composes and issues Invitations for Bids (IFB) and Requests for Proposals (RFP) for goods and services. Evaluates criteria and contract terms and service specifications, delivery parameters, and quality of goods and services.
2. Gathers information to assist in drafting IFB and RFP specifications and preparing contract documents. Determines if there are special conditions that need to be included in the bid based on what is being purchased. Establishes the scope and timing for the bid opening and award based on when delivery of the products is required.
3. Receives bids and recommends selecting a particular vendor(s) based on vendor and product preferences, specifications, and established bid criteria.
4. Assists in resolving bid and contract problems with vendors and shipping companies. Interprets bid and contract areas of dispute, suggests courses of action, and sets up conferences between the agency and vendor.

- **Accounting and Asset Control 15%**

1. Processes procurement documentation to account for all department resources by reviewing Helpdesk Expert Automation Tool (HEAT) tickets; coding equipment purchases; assigning and logging inventory numbers; entering items into database systems; and ensuring that necessary adjustments are made at year-end.
2. Maintains internal accounting controls to track the purchase of goods and services. Ensures accurate records by monitoring outstanding purchase orders, comparing physical and perpetual inventory records, and coordinating property auditing and reporting using spreadsheet applications and the state's accounting system. Reviews property reports to ensure that equipment expenditures have been accounted for and that assets are recorded according to funding source. Requests and distributes reports on a monthly basis and as needed.
3. Processes payment claims to ensure they comply with department policies. Reviews invoices and payment requests for proper approvals and allocates charges to the correct responsibility centers. Identifies accruals at fiscal year end and provides a report to the accounting unit.
4. Enters purchase orders for all items purchased. Maintains documentation of all bids and purchases by compiling purchasing data into reports, logs, and files.
5. Manages maintenance contracts for office equipment and department cell phone contracts.
6. Manages surplus property. Works with Information Technology staff to send surplus equipment to the Office of Public Instruction for distribution to schools, recycle it, or report it as surplus property.

- **Purchasing Support 15%**

1. Issues state procurement cards to authorized department personnel ensuring compliance with internal and external policies, procedures and guidelines. Provides instruction individually, in groups, and through on-line help documents located on the department's Intranet site.
2. Issues and delivers supplies according to established time schedules, requests, and facility procedures to provide continued services to department staff. Accounts for all supplies used.

3. Maintains computerized inventory of supplies and equipment; conducts a physical inventory of supplies to track usage; and maintains documentation for all inventory counts conducted.
4. Reviews product inquiries, complaints, and defective merchandise claims.
5. Provides training and technical assistance to department employees for procurement and purchasing requirements.

- **Other Duties as Assigned 5%**

1. Performs a variety of other duties as assigned by the supervisor.

Job Requirements

To perform successfully as a purchasing technician, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in multi-tasking; paying attention to details and accuracy; managing multiple priorities under tight deadlines; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; conflict resolution; compiling and analyzing data from multiple sources; following written and oral directions and instructions; researching data to identify and resolve a wide variety of problems and issues; and word processing, spreadsheet, and database applications are required. The incumbent is required to accept responsibility for decisions made, considering the relative costs and benefits of potential actions. Incumbent is required to exercise discretion and judgment in handling confidential and sensitive information.

This position requires knowledge of Montana procurement and purchasing statutes; department purchasing and procurement policies, procedures, and guidelines; contract negotiation; the Statewide Accounting, Budgeting, and Human Resource Systems (SABHRS); accounting methods and techniques; asset management and control protocols and systems; office administration; training techniques and methods; and effective information dissemination techniques.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is one year of post-secondary education or training in accounting, purchasing, procurement, business, office administration, or directly related field and two years of job-related work experience.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with angry and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. Occasionally, the incumbent may be called on to assist in lifting heavier items up to 30 pounds and push or move carts or large items. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Steve Austin, Division Administrator Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____